

# TRUSTEEtips

INFORMATION AND EVENTS FOR TODAY'S SC PUBLIC LIBRARY TRUSTEES

JULY 2006

## The Role of the Library Trustee in Budget Planning

Public library board members need a basic understanding of library finances and the budget process in their county and the state. The board has a clear responsibility to ensure that public funds are used in the best interest of the community and that the library has adequate financing to continue its programs and services.

### Successful Budget Planning

The budget is directly related to the library's planning and political funding process. Good service and good planning will result in an innovative progressive budget. A budget that merely repeats previous budgets is indicative of lack of planning and is a disservice to the library's clientele.



**Know who does what.** A necessary first step in successful budget planning is knowing who has authority and who does what in the budget planning process. Trustees play a vital role in creating the budget and getting it approved because they are the library's link to the community and its government. The preparation of the budget is a cooperative process involving trustees, the library director and staff. The library director is responsible for preparation of the budget request; the board of trustees is responsible for final approval and adoption of the budget.

**Understand the budget's planning context.** The budget must reflect the purposes and priorities of the library as outlined in the long range plan. Budget requests should be made within the context of a planning process.

**Question everything.** The budget is a tool for accomplishing specific objectives. When an objective has been accomplished, phase out the program or project that was designed to meet it and request that funding be moved to the next priority.

**Be realistic.** Board members should understand the financial climate in the community, so that they know what can and cannot be expected in the way of library support. They should understand the competing demands of other departments on the governmental funding entity, so that they know what is the library's fair share in relation to other departments. Boards may use the South Carolina Annual Library Statistical Summary published by the State Library to compare their library with others and to understand their government's level of effort. The South Carolina Public Library Standards is also an excellent tool to use to justify increased funding needed for services. These documents are available at the State Library's website: [www.statelibrary.sc.gov](http://www.statelibrary.sc.gov)

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**Additional funding.** Not all money has to come from local government sources. Grants, donations and sponsors can be used to help fund one-time projects. Boards should look for community support for alternative funding when appropriate.

**The library as a business.** The library should have a clear mission and be accountable. Those who are responsible for the budget must be accountable.

## Budget Presentation

Boards must justify the budget increases in the request, as well as the budget base. They must state why the community needs the service and what is unique about the service. They must describe the library's contributions and the benefit to taxpayers. They should describe who uses the particular library service. They should present library goals, plans and accountability measures.

Library trustees should not wait for a budget presentation to make a case for needed funding or to describe programs and services. This is an ongoing responsibility of all trustees.

The library must be seen as a basic community and information agency. Invite officials to programs, receptions and library activities. Promote and provide reference services and assistance to county departments and officials. Be sure to share your successes with local government authorities. Awards, record numbers at summer library programs, staff accomplishments and news articles should be part of regular reporting about the library to the county council.

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